



# Charlotte Business INClusion(CBI)

## State of the Program

Workforce & Business Development Committee Presentation

October 12, 2020

## OBJECTIVE

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- Current State of CBI Program
- Disparity Study Update
- Future State of CBI Program

## CBI PROGRAM GOALS

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- Certify and register minority, women and small business enterprises (MWSBE)
- Establish MWSBE prime and subcontracting goals
- Monitor diversity and inclusion contract compliance
- Track and report on citywide MWSBE spend
- Conduct MWSBE education and outreach initiatives
- Capacity Building Efforts in Collaboration with Economic Development
- Collaborate with departments to increase opportunities for MWSBE participation

*The mission of the CBI program is to promote diversity, inclusion, and local business opportunities in the city's contracting and procurement process for businesses located in the Charlotte region.*

## CURRENT STATE OF CBI – CONTINUOUS IMPROVEMENTS

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- Collaborations with Major Stakeholders
  - Departments, Vendors, Other Inclusion Leaders, Major Primes, Private Supplier Diversity Organizations, Financial & Academic Institutions
- Committee Support – Workforce & Business Development & CBIAC
- Implementation of Policy Amendments
- Compliance & Reporting
- CBI Team Development
- Communications (Training, Vendor Compliance, Policy Amendment Changes)
- Increase Certifications
- EarlyBird Project Communications System Implementation

# YEAR OVER YEAR TOTAL CERTIFIED VENDORS



## ADOPTION OF POLICY AMENDMENTS – JULY 1, 2020

### CBI Policy Revisions (Effective 7/1/20)

1. Provide history of and legal justification for adoption of 2017 Disparity Study.
2. Give bidders twenty-four hours to finalize CBI Form 3.
3. Change **"Breaking Down Work"** Good Faith Effort\* from fifteen points to ten points.
4. Change **"Negotiating in Good Faith with MWSBEs"** Good Faith Effort\* from fifteen points to ten points.

\*State law requires a bidder to achieve 50 points to satisfy good faith efforts.

## ADOPTION OF POLICY AMENDMENTS – JULY 1, 2020

CBI Policy Revisions (Effective 7/1/20)	
5.	Increase the duration of SBE certification from three years to four years
6.	Eliminate the ability to count a single MWSBE towards a MWBE Goal and SBE Goal on a single contract. Firm would count towards either the MWBE Goal or SBE Goal
7.	Lower construction subcontracting threshold from \$300,000 to \$200,000 which benefits certified MWSBEs through: <ul style="list-style-type: none"> <li>• adequate bonding at \$200k rather than \$300K which many certified firms cannot meet</li> <li>• creating “right size” opportunities for smaller firms to grow into larger jobs, while gaining experience and increasing capacity</li> <li>• Increasing the pool of available opportunities to set goals and improve participation on contracts at lower levels</li> </ul>

## DISPARITY STUDY PURPOSE

- What is a disparity study?
  - A determination of whether disparity exists between the number of minority-owned business enterprises (MBEs) and/or women-owned business enterprises (WBEs) available to perform on city contracts and the city’s utilization of these firms. (Availability/Utilization)
  - A determination of the extent to which any disparity is attributable to discrimination.
- Why should the city conduct a disparity study?
  - Offers an objective analysis of contracting practices over a five year period.
  - Ensures a thorough approach to understanding and addressing disparities that exist.
  - Provides a legal justification for race-conscious and gender-conscious goal setting if disparity is shown in specific areas of contracting.

## DISPARITY STUDY SCHEDULE – KEY MILESTONES & DATES

DATE	EVENT
October 15, 2020	Issuance of RFP
October 22, 2020	Request for Proposals Acknowledgement
October 22, 2020	Submission of Written Questions
October 28, 2020	Non-Mandatory Pre-Proposal Conference
November 18, 2020	Proposal Submission
November 18, 2020 - December 18, 2020	Evaluation, Shortlisting, Company Demonstration, and Interviews
January 25, 2021	Contract Award by Council
March 1, 2021	Services Commence

## DISPARITY STUDY RFP EVALUATION COMMITTEE

Name	Organization
Victoria Johnson	City Manager's Office
Marcy Mars	Procurement
Edison Cassels	CBIAC
Michele Torres	Aviation
Jerrienne Jackson	Economic Development
TBD	Office of Equity & Mobility
Steven Coker	CBI

## FUTURE STATE OF CBI

- SWOT Analysis
- Strategic Plan
- Best In Class Diversity, Equity & Inclusion Program

## STRATEGIC PLAN – SWOT ANALYSIS

PURPOSE	
W ill be used as a part of the CBI Strategic Plan Development	

  

S	INTERNAL STRENGTHS
1	What do our vendors like most about the CBI program?
2	What are we most efficient at?
3	What resources have been our best investment?
4	What can we do in less time?
5	What makes us stand out?
6	What do we do well? What unique resources can we draw on? What do others see as our strengths?
7	Other?

  

W	INTERNAL WEAKNESSES
1	Where do we lack efficiency?
2	Where are we wasting money? (e.g. programmatic funding)
3	Where are we wasting time and other resources?
4	What can we do better? (think Best Practices)
5	What are our top complaints relative to what we do?
6	What could we improve? Where are we not properly resourced (staff, funding, technology, etc.)? What do others likely see as our weaknesses?
7	Other?

  

O	EXTERNAL OPPORTUNITIES
1	What is missing in our market?
2	What could we create or do better?
3	What new trends are occurring?
4	What new technologies can we use?
5	What are changes in the market that we should be aware of?
6	What opportunities are open to us? What trends/best practices could we take advantage of? How can we turn strengths into opportunities?
7	Other?

  

T	EXTERNAL THREATS
1	What changes are occurring in our market's environment?
2	What are some technological forces that can impact what we do?
3	What changes are occurring in the way we're being discovered?
4	What social changes could threaten us?
5	Are there any threatening government/political policies or regulations?
6	What threats could harm us? What are other agencies/organizations doing? What threats do our weaknesses expose? How can we mitigate threats caused by our weaknesses?
7	Other?

## STRATEGIC PLAN

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- Policy development
- Marketing and communications plan development
- Establishing data analytics and tracking
- Program budget
- Incremental program goal setting
- Program metrics and expectations
- Capacity Building

## PATH TO BEST IN CLASS PROGRAM

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- ✓ Communicate program goals and results
- ✓ Highlight and recognize suppliers
- ✓ Award performance
- ✓ Build capacity and grow diverse firms
- ✓ Link to performance evaluations
- ✓ Provide periodic reports
- ✓ Host matchmaking and outreach events
- ✓ Facilitate mentoring programs
- ✓ Develop bonding and insurance initiatives
- ✓ Recognition of CBI firms that participate in Workforce Development Programs

## FOUNDATION TO BEST IN CLASS PROGRAM

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- ✓ Broad support from city leadership
- ✓ Buy-in from city staff
- ✓ Staff leadership and structural support
- ✓ Maximum percentage of spend with diverse firms
- ✓ Diverse firms continued growth and job creation
- ✓ Regular and ongoing communication of goals and results
- ✓ Investment in the CBI program

## WORKFORCE AND BUSINESS DEVELOPMENT COMMITTEE

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**James Mitchell**  
*Chair*



**Tariq Bokhari**  
*Vice Chair*



**Dimple Ajmera**



**Renee' Johnson**



**Malcolm Graham**

## CHARLOTTE BUSINESS INCLUSION ADVISORY COMMITTEE (CBIAC)

CBIAC	
Edison Cassels, Chair	At-Large
Vernetta Mitchell, Vice-Chair	At-Large
Stephanie Kegly Adler	At-Large
Nigel Long	At-Large Charlotte Regional Business Alliance
Charity Kimmel	At-Large
Jamal Cook	At-Large
William Stricker	Carolina Association of General Contractors (CAGC)
Nicole Reina	National Association of Women Business Owners (NAWBO)
Sandra "Lisette" Velez	Hispanic Contractors Association (HCAC)
Michelle Ho	Carolinas Asian-American Chamber of Commerce
Valerie Del	Metrolina Minority Contractors Association
Chevonne Willis	At-Large
Jessie Jacobs	Metrolina Native American Association
Johanna Suarez	Latin American Chamber of Commerce (LACCC)
Chyna Green	At-Large

## Questions?

